Email Configuration

Sales Staff Documentation

Guide for Magento administrators, technical project owners, and implementation teams.

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EXTENSION
Magento 2 Extension Sales Staff

Email Configuration

Staff email settings live under **Stores > Configuration > MageB2B > Staff > Email settings**. A template must be selected for its event and included in **Activated Emails** before the extension sends it.

Base templates

The base extension supplies templates for:

- new Staff account
- password setup for a customer created by Staff
- Staff activation and deactivation
- forgotten Staff password
- Staff password updated

Optional packages add their own visit, history or quote templates. After installing an add-on, revisit **Activated Emails** rather than assuming every new template became active.

Order recipients

Email order to can send to nobody, customer and Staff as recipients, customer only, customer with Staff as BCC, or Staff only. The default is customer only.

The separate customer-order copy is relevant when a customer orders directly and permanent primary-Staff attribution is enabled. Test it with an attributed customer order because an unassigned order has no representative to copy.

CC and BCC fields apply to Staff emails selected by the extension. Use role mailboxes with an agreed retention policy, not personal addresses added for debugging.

Sender identity

Staff emails are sent with the sender identity stored at `staff/create_account/email_identity` (default `general`). There is no Admin field for it — set it with `bin/magento config:set staff/create_account/email_identity <identity>` or via `config.xml`/`env.php`, using a Magento email sender identity such as `general`, `sales` or `support`.

Passwords

Send plain password in staff account emails is disabled by default and should remain disabled. Use password-creation and reset links. Never troubleshoot delivery by putting a known password into a template.

Test safely

In a non-production mailbox, trigger:

1. new Staff account
2. activation and deactivation
3. forgotten password and completed reset
4. customer creation by Staff
5. Staff-attributed order using the intended recipient option
6. one event from each installed email-producing add-on

Read the recipient, sender/store identity, links, translated store view and customer/Staff names in the rendered message.

If an email is missing

1. Confirm the event completed successfully in Magento.
2. Check the template is selected and active at the correct scope.
3. Check recipient routing and that the expected Staff/customer email is present.
4. Inspect Magento logs and the configured queue/cron if mail is asynchronous.
5. Send an unrelated Magento transactional email to separate Staff configuration from transport failure.
6. Check spam/quarantine and provider logs.

Do not paste SMTP credentials, bearer tokens, quote links or SAML data into support screenshots.

Related: Configuration and Common Issues.